

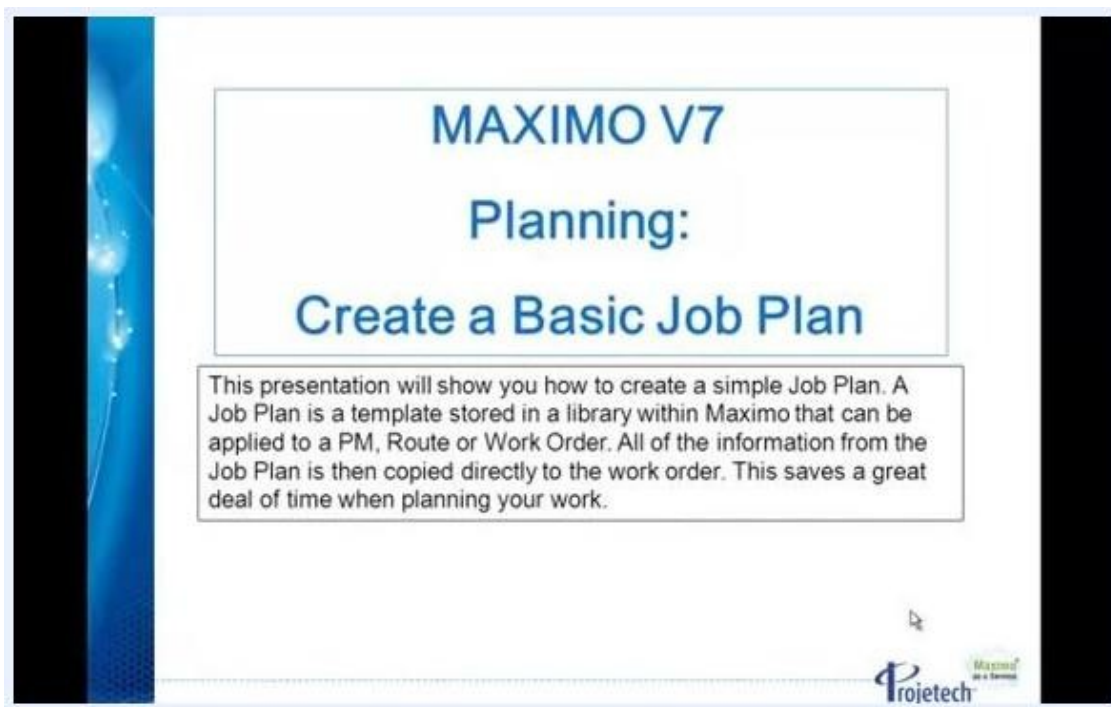
How to Create a Job Plan in IBM Maximo

Learning how to create a job plan in IBM Maximo helps you standardize recurring maintenance work and save significant time during planning. A job plan is a template stored in the Maximo library that can be applied to Preventive Maintenance (PM) records, routes, or work orders. Once applied, all the information in the job plan—tasks, labor, materials, and assets—is copied directly to the work order. This guide walks you through creating a basic job plan and assigning it to a work order.

Understanding the purpose of a job plan

Before you begin, it helps to understand what a job plan does:

- A job plan is a template stored in Maximo.
- You can apply it to a PM, a route, or a work order.
- All information from the job plan is copied to the work order, which saves significant planning time.

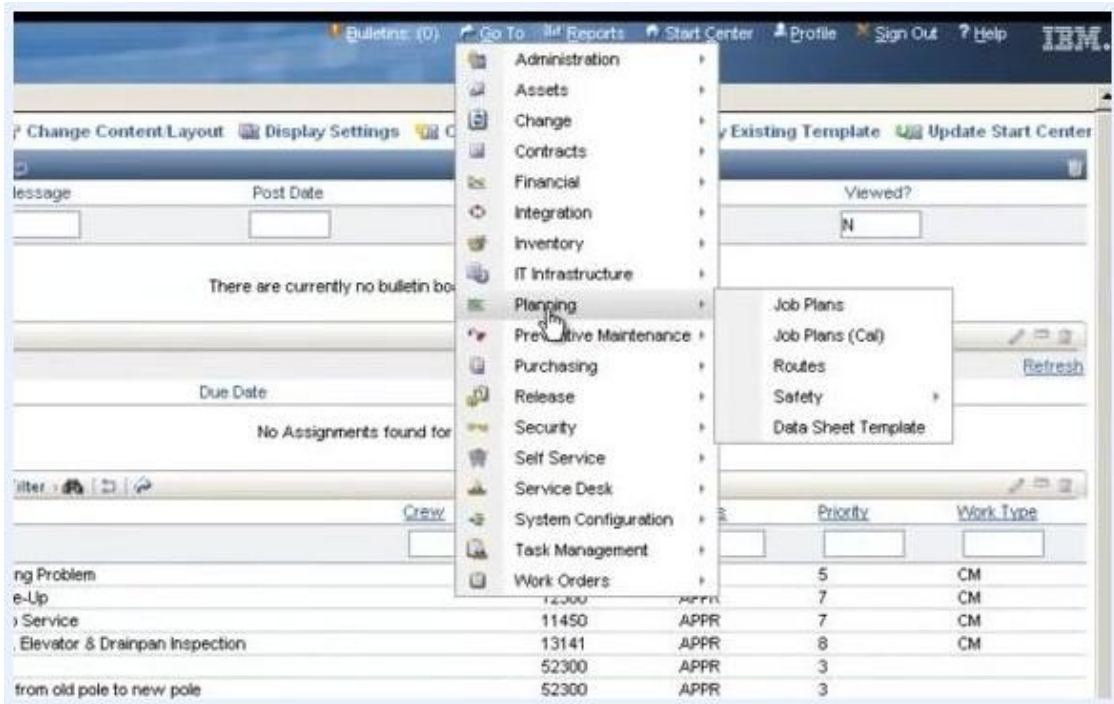


Introductory slide for Maximo V7 Planning showing that a job plan is a template stored in Maximo, applicable to PM, Route, or Work Order, with all information copied to the work order to save time.

Creating a basic job plan

1. Navigate to the Job Plans section

Open the **Go To** menu in Maximo, hover over the **Planning** module, and slide across to select **Job Plans** from the dropdown menu.



Maximo "Go To" dropdown menu expanded, with the cursor highlighting Planning > Job Plans alongside other modules such as Administration, Assets, and Contracts.

2. Create a new job plan record

Click **New Record** at the top of the Job Plans screen to start a new job plan.

3. Enter a unique job plan identifier

In the **Job Plan** field, enter a unique identifier for your job plan (for example, [JM8746A](#)).

4. Provide a description

Tab to the **Description** field and enter a basic description for the job plan.

5. Set organization and site

Organization and Site settings control who can use the job plan:

- Leaving both fields blank allows anyone in the Maximo instance to use the job plan.

- Entering an **Organization** restricts use to that organization.
- Entering both **Organization** and **Site** restricts use to that specific site within the organization.

For this example, enter **BEDFORD** in the **Site** field. When you tab out of the field, the **Organization** field auto-populates (for example, **EAGLENAT**).

The screenshot shows a web-based form for creating a job plan. At the top, there is a navigation bar with links like 'Bulletins: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a toolbar with icons for various functions. The main form area has two input fields at the top: 'Organization' with the value 'EAGLENAT' and 'Site' with the value 'BEDFORD'. To the right of these is an 'Attachment' field. Below the input fields is a section for 'Responsibility' with several sub-fields: 'Supervisor', 'Crew', 'Lead', 'Work Group', 'Owner', and 'Owner Group'. Each of these fields has a small icon next to it. To the left of the 'Responsibility' section are several checkboxes and input fields: 'it WVO Class', 'WVO Priority', 'Interruptible?', 'Controlled?', 'ow Control?', 'Flow Action', and 'tion Assist?'. At the bottom of the form, there is a table with columns 'Nested Job Plan', 'Duration', and 'Meter'. The table currently shows 'No rows to display...'. A 'Help' button is located at the bottom right of the form.

Job Plan creation screen showing the Organization field populated as EAGLENAT, the Site field populated as BEDFORD, and the Responsibility section below, with the cursor in the Site field.

6. Assign a crew or group

Avoid entering individual names—such as a Supervisor, Lead, or Owner—in the Responsibility section. Using names can create maintenance issues if personnel change, since every affected job plan would then need to be updated. Instead, use group values such as Crew, Work Group, or Owner Group, which remain stable over time.

In the **Crew** field, enter **CREW1** and tab out of the field to save the value. Leave the other fields (Supervisor, Lead, Work Group, Owner, Owner Group) blank unless a group assignment is appropriate.

The screenshot shows a software interface with a top navigation bar containing 'Organization' (EAGLENA), 'Site' (BEDFORD), and 'Attachments'. Below this is a 'Responsibility' section with a table of fields:

Responsibility	
Supervisor	
Crew	CREW1
Lead	
Work Group	
Owner	
Owner Group	

Below the Responsibility section is a 'Job Plan' section with a table with columns 'Duration' and 'Meter'. A 'New Row' button is located at the bottom right of the Job Plan section.

Responsibility section with the Crew field filled in as CREW1 and the remaining fields left blank; Site is BEDFORD and Organization is EAGLENA.

7. Add job plan tasks

Locate the **Job Plan Tasks** section below the Responsibility area and click **New Row** to add your first task. Tasks are automatically numbered in increments of 10 (10, 20, 30, and so on).

For Task 10, confirm the **Task** field shows 10 and enter ISOLATE COMPRESSOR in the **Description** field.

The screenshot displays a software interface for managing job plans. The top section, 'Job Plan', shows details for 'COMPRESSOR SERVICE' with fields for Status (DRAFT), Template Type (Maintenance), Duration (0.00), and Classification. The bottom section, 'Job Plan Tasks', shows a table with columns for Sequence, Task, and Description. Task 10 is highlighted, and its details are shown below, including Organization (EAGLENA), Site (BEDFORD), Task (10), and Description (ISOLATE COMPRESSOR).

Sequence	Task	Description	Nested Job Plan
	10	ISOLATE COMPRESSOR	

Details for Task 10:

Organization	EAGLENA	Duration	0.00
Site	BEDFORD	Meter	
Task	10	Owner	
Sequence		Owner Group	
Nested Job Plan		Flow Controlled?	
Classification		Suspend Flow Control?	
Class Description		Flow Action	
Launch Entry Name		Flow Action Assist?	
		Predecessors	

Job Plan Tasks section with Task 10 entered and the Description field showing "ISOLATE COMPRESSOR."

8. Add a long description to a task (optional)

Click the **Long Description** button (the notepad icon) to the right of the Description field. In the popup window, enter additional details, such as [FOLLOW ALL PLANT SAFETY PRECAUTIONS](#), then click **OK** to save and close the window. The Long Description button turns orange, indicating that additional information is present.

The screenshot shows a software interface for managing job plans. At the top, there's a header bar with 'Find', 'Select Action', and tabs for 'List', 'Job Plan', 'Work Assets', and 'Specifications'. Below this, a form displays details for a job plan named 'JOB745A' with the title 'COMPRESSOR SERVICE' and organization 'EAOLENA'. The 'Details' section includes fields for Status (DRAFT), Template Type (Maintenance), Duration (0.00), Classification, Class Description, and Launch Entry Name. To the right, there are checkboxes for 'Default WO Class', 'WO Priority', 'Interruptible?', 'Flow Controlled?', 'Suspend Flow Control?', 'Flow Action', and 'Flow Action Assist?'. A 'Responsibility' section lists Supervisor, Crew (CREW1), and Lead. Below this is a 'Job Plan Tasks' table with columns for Sequence, Task, and Description. The table shows a single task with Sequence 10 and Description 'ISOLATE COMP'. To the right of the table is a 'Nested Job Plan' field. Below the table, another 'Details' section for the task includes fields for Organization (EAOLENA), Site (BEDFORD), Task (10), Sequence, Nested Job Plan, Classification, Class Description, Launch Entry Name, Duration (0.00), Meter, Owner, Owner Group, Flow Controlled?, Suspend Flow Control?, Flow Action, Flow Action Assist?, and Predecessors.

Long Description popup for Task 10 showing the text "FOLLOW ALL PLANT SAFETY PRECAUTIONS" entered.

9. Add the remaining tasks

Repeat the process to add further tasks:

- Click **New Row**, confirm the **Task** field shows [20](#), and enter [REPLACE BELT](#) in the **Description** field.
- Click **New Row**, confirm the **Task** field shows [30](#), and enter [REPLACE GASKET](#) in the **Description** field.

- Click **New Row**, confirm the **Task** field shows 40, and enter **RETEST** in the **Description** field.

The screenshot displays the 'Job Plans' application window. The 'Job Plan Tasks' section is active, showing a list of tasks. The tasks are as follows:

Sequence	Task	Description	Nested Job Plan	Duration	Meter
10	ISOLATE COMPRESSOR			0.00	
20	REPLACE BELT			0.00	
30	REPLACE GASKET			0.00	

Below the task list, the 'Details' section for the selected task (30 REPLACE GASKET) is visible. It includes fields for Organization (EAOLBPA), Site (BELLFORD), Task (30 REPLACE GASKET), Sequence, Nested Job Plan, Classification, Class Description, and Launch Entry Name. To the right of these fields are checkboxes for 'Interruptible?', 'Flow Controlled?', 'Suspend Flow Control?', 'Flow Action', and 'Flow Action Assist?'. At the bottom, there is a 'Predecessors' field.

Job Plan Tasks section showing three tasks listed: 10 ISOLATE COMPRESSOR, 20 REPLACE BELT, and 30 REPLACE GASKET.

Adding labor and materials

10. Collapse task details to conserve screen space

Click the orange detail button to the left of the task list to collapse the expanded task detail section. This is especially useful when a job plan contains many tasks.

The screenshot shows the 'Job Plan' screen. At the top, there are input fields for 'Class Description' and 'Launch Entry Name', each with a search icon. To the right, there are buttons for 'Suspend f' and 'Flow A'. Below these is a 'Job Plan Tasks' section with a 'Filter' button and a '1 - 4 of 4' indicator. The task list has columns for 'Sequence', 'Task', and 'Description'. The tasks are: 10 ISOLATE COMPRESSOR, 20 REPLACE BELT, 30 REPLACE GASKET, and 40 RETEST AND PLACE BACK IN SERVICE. The task 40 is selected, and its details are expanded. Below the task list, there are tabs for 'Labor', 'Materials', 'Services', and 'Tools'. The 'Labor' tab is active, showing a 'Planned Labor' section with a 'Filter' button and a table with columns for 'Task', 'Craft', 'Skill Level', and 'Labor'.

Sequence	Task	Description
10	ISOLATE COMPRESSOR	
20	REPLACE BELT	
30	REPLACE GASKET	
40	RETEST AND PLACE BACK IN SERVICE	

Task	Craft	Skill Level	Labor
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Job Plan screen with the task detail section expanded, showing the orange detail button located to the left of the task list.

Below the Job Plan Tasks section, click the **Labor** tab to switch to the labor assignment area.

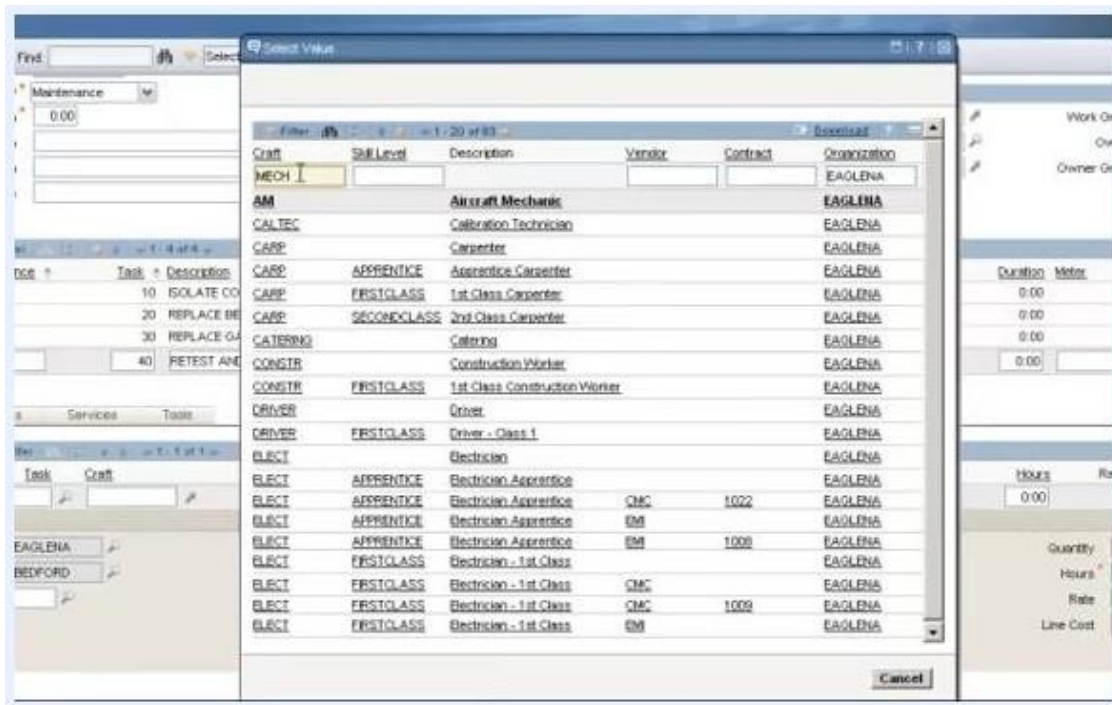
The screenshot shows the 'Select Value' dialog box. The 'Craft' column is highlighted, and the value 'MECH' is entered. The 'Description' column shows 'Aircraft Mechanic'. The 'Vendor' column shows 'EAGLENA'. The 'Contract' column shows 'EAGLENA'. The 'Organization' column shows 'EAGLENA'. The 'Filter' is set to '1 of 83'. The 'Download' button is visible. The background shows a task list with columns for Task, Description, Duration, and Meter.

Labor sub tab selected, displaying the Planned Labor section below the Job Plan Tasks.

Click **New Row** in the Planned Labor section to add a new labor entry.

12. Assign labor using a craft code

Rather than entering a specific person's name, enter a craft code. In the **Craft** field, enter **MECH** to indicate a mechanic, then click the **Select Value** icon (magnifying glass) next to the field to open the craft selection window.

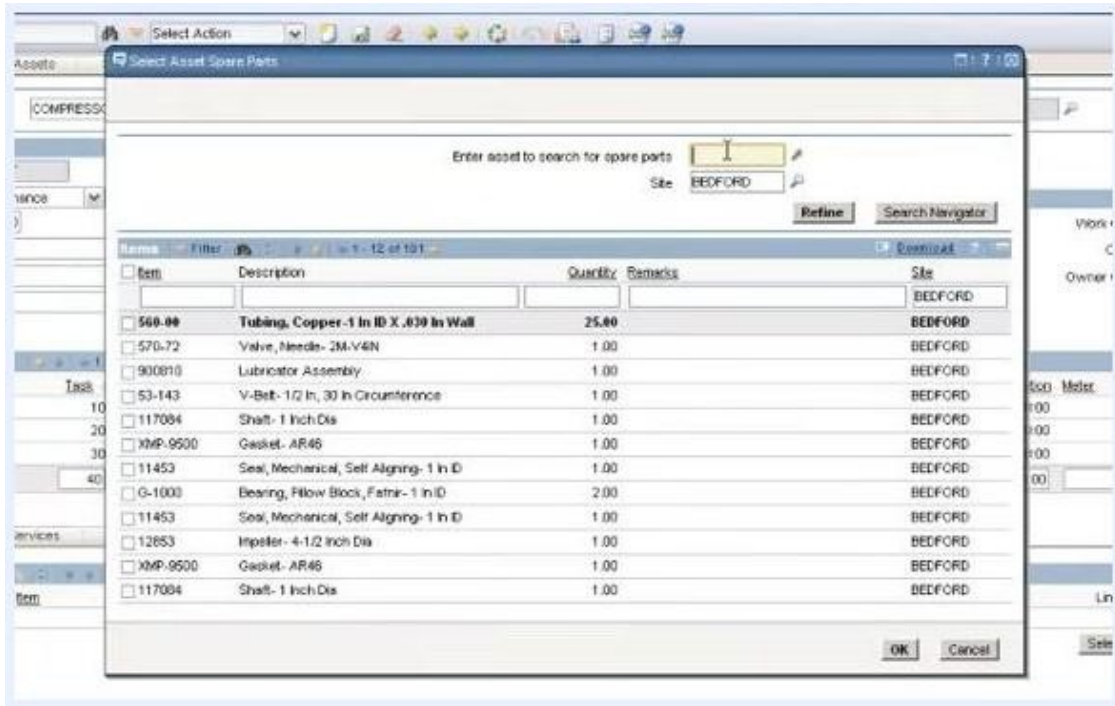


Planned Labor section with a new row added, the Craft field ready for input, and the Select Value icon visible.

In the craft selection window, type **MECH** in the filter box to display all mechanic-related craft codes. Review the list, which includes both internal and external labor options—codes associated with a vendor are typically external labor, and a value in the **Contract** column indicates an active labor contract for that craft. Select the desired craft (for example, **MECH** or **FIRSTCLASS**) by clicking the appropriate row.

13. Complete the labor assignment details

Leave the **Task** field blank if the labor applies to the entire job plan rather than a specific task. In the **Quantity** field, enter **1** to indicate one mechanic is required, and in the **Hours** field, enter **4** to estimate four hours of work. The **Rate** field auto-populates if configured—review it for accuracy.



Planned Labor row filled in with Craft "MECH," Description "Mechanic," Quantity 1, Hours 4, and an auto-filled Rate.

14. Select spare parts for the job plan

Click the **Materials** tab next to the Labor tab, then click **Select Spare Parts** to open the spare parts selection window. In the **Enter asset to search for spare parts** field, type the asset identifier (for example, **COMPRESSOR**), and confirm the **Site** field shows the correct site (for example, **BEDFORD**). Click **Refine** to filter the list of available spare parts for that asset and site.

Review the list of spare parts, including item numbers, descriptions, quantities, and site information. Check the boxes for the parts you need, then click **OK** to add the selected spare parts to your job plan.

Enter asset to search for spare parts

Site: BEDFORD

Refine Search Navigator

Item	Description	Quantity	Remarks	Site
560-00	Tubing, Copper-1 in ID X .639 in Wall	25.00		BEDFORD
570-72	Valve, Needle- 2M-V4N	1.00		BEDFORD
900810	Lubricator Assembly	1.00		BEDFORD
53-143	V-Belt- 1/2 in, 30 in Circumference	1.00		BEDFORD
117094	Shaft- 1 Inch Dia	1.00		BEDFORD
XMP-9500	Gasket- AR46	1.00		BEDFORD
11453	Seal, Mechanical, Self Aligning- 1 in ID	1.00		BEDFORD
G-1000	Bearing, Pillow Block, Fatma- 1 in ID	2.00		BEDFORD
11453	Seal, Mechanical, Self Aligning- 1 in ID	1.00		BEDFORD
12653	Impeller- 4-1/2 inch Dia	1.00		BEDFORD
XMP-9500	Gasket- AR46	1.00		BEDFORD
117094	Shaft- 1 Inch Dia	1.00		BEDFORD

OK Cancel

Select Asset Spare Parts window with asset and site fields populated, showing a list of available spare parts for site BEDFORD.

Finalizing the job plan

15. Add locations, assets, or items to the job plan

Under the **Work Assets and Safety Plans** tab, click **New Row** to add a new asset, location, or item. Enter the asset as [11300UM](#), fill in any other relevant fields, and save the entry. You can add multiple assets or locations to specify exactly what the job plan applies to.

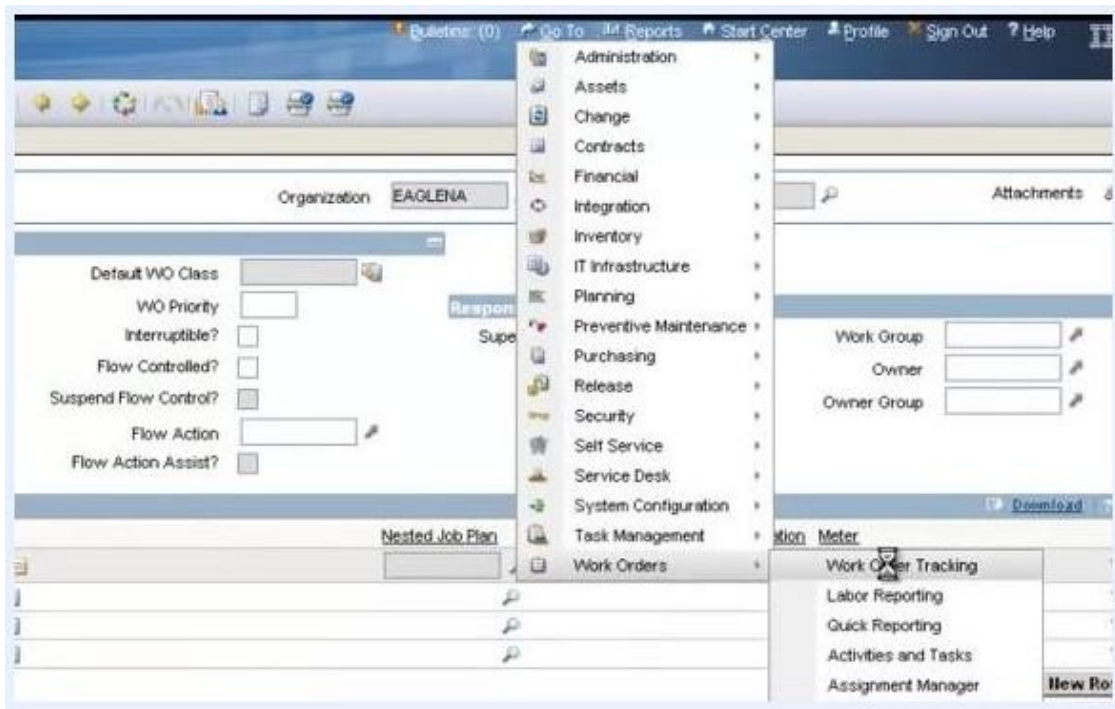
The screenshot shows the 'Job Plans' application interface. At the top, there's a 'Job Plans' header with a search bar and a 'Select Action' dropdown. Below this are tabs for 'List', 'Job Plan', 'Work Assets', and 'Specifications'. The 'Job Plan' tab is active, showing a job plan with ID 'JM8746A' and title 'COMPRESSOR SERVICE'. The 'Details' section contains fields for 'Status' (DRAFT), 'Template Type' (Maintenance), 'Duration' (0:00), 'Classification', 'Class Description', and 'Launch Entry Name'. To the right, there's a list of 'Default WO' items including 'WO Pr', 'Interrup', 'Flow Contro', 'Suspend Flow Co', 'Flow A', and 'Flow Action As'. At the bottom, the 'Job Plan Tasks' section shows a table with columns 'Sequence', 'Task', and 'Description'. The first task is '10 ISOLATE COMPRESSOR'.

Job plan screen with the **Work Assets** tab active, showing fields for location, asset, and item, with the asset field filled in as [11300UM](#).

Confirm that the asset and location details are correct—for example, Asset: [11300UM](#), Description: Reciprocating Compressor - Air Cooled/100 CFM, Organization: EAGLENA, Site: BEDFORD—and ensure all required fields are filled in.

16. Activate the job plan

Return to the **Job Plan** tab and change the status from **DRAFT** to **ACTIVE**. In the **Change Status** dialog, select **Active** as the new status and click **OK**.



Change Status dialog for a job plan, showing the transition from DRAFT to ACTIVE with the OK button highlighted.

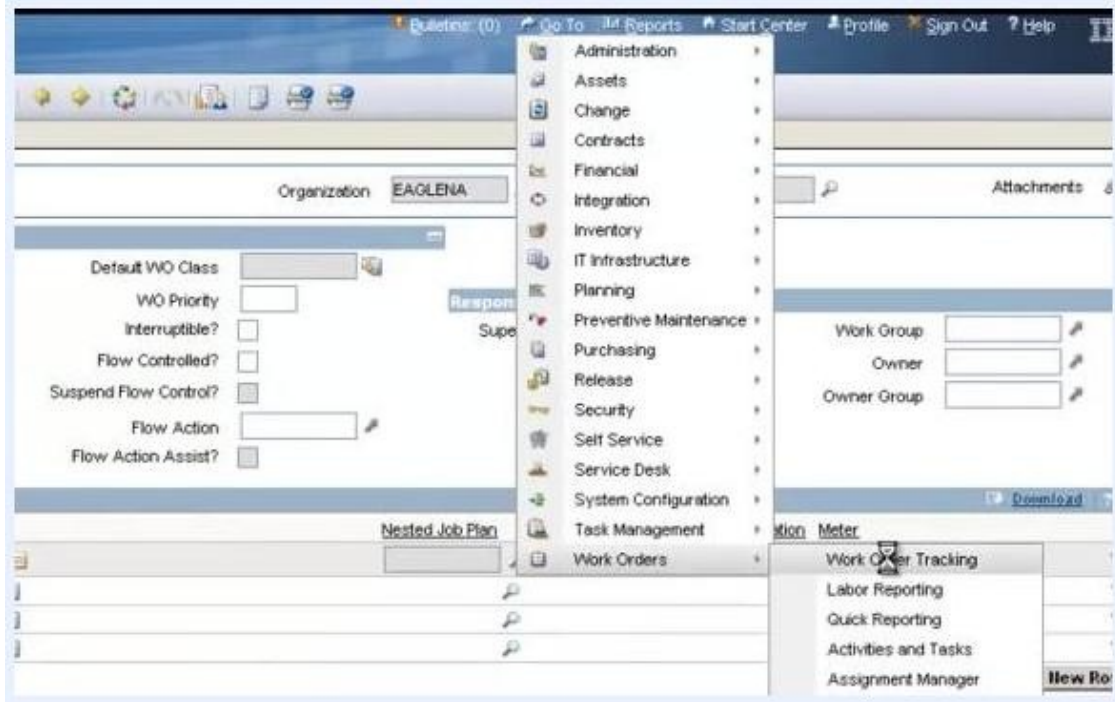
Assigning the job plan to a work order

17. Create a new work order

Click the **Go To** menu, navigate to **Work Orders > Work Order Tracking**, and click **New Work Order**. Fill out the basic work order information, such as:

- Work Order: 1193
- Description: COMPRESSOR SERVICE
- Location: BR300
- Asset: 11300UM
- GL Account: 6210-325-000
- Site: BEDFORD

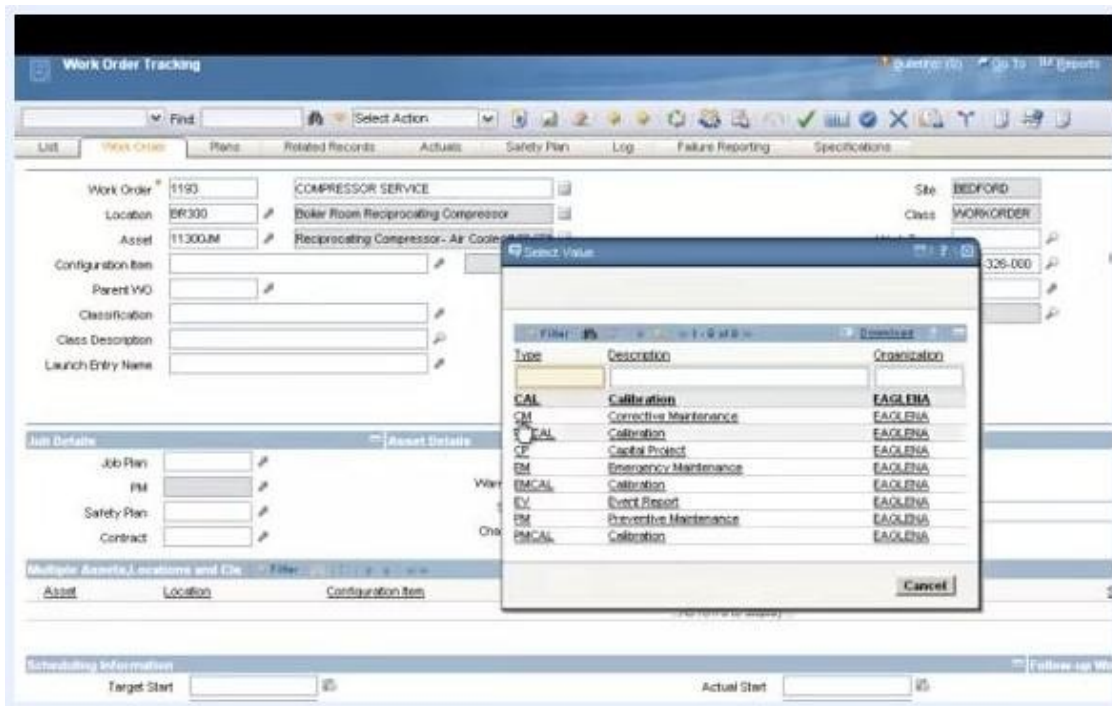
- Class: WORKORDER



Dropdown navigation menu with the cursor positioned over Work Order Tracking under Work Orders.

18. Select the work type for the work order

In the **Work Order Tracking** screen, locate the **Work Type** field and click the arrow next to it to open the **Select Value** dialog. Review the available options—for example, CAL (Calibration), CM (Corrective Maintenance), CT (Calibration Test), CR (Control Report), and EM (Emergency Maintenance)—then select **CM** and click **OK** to confirm.



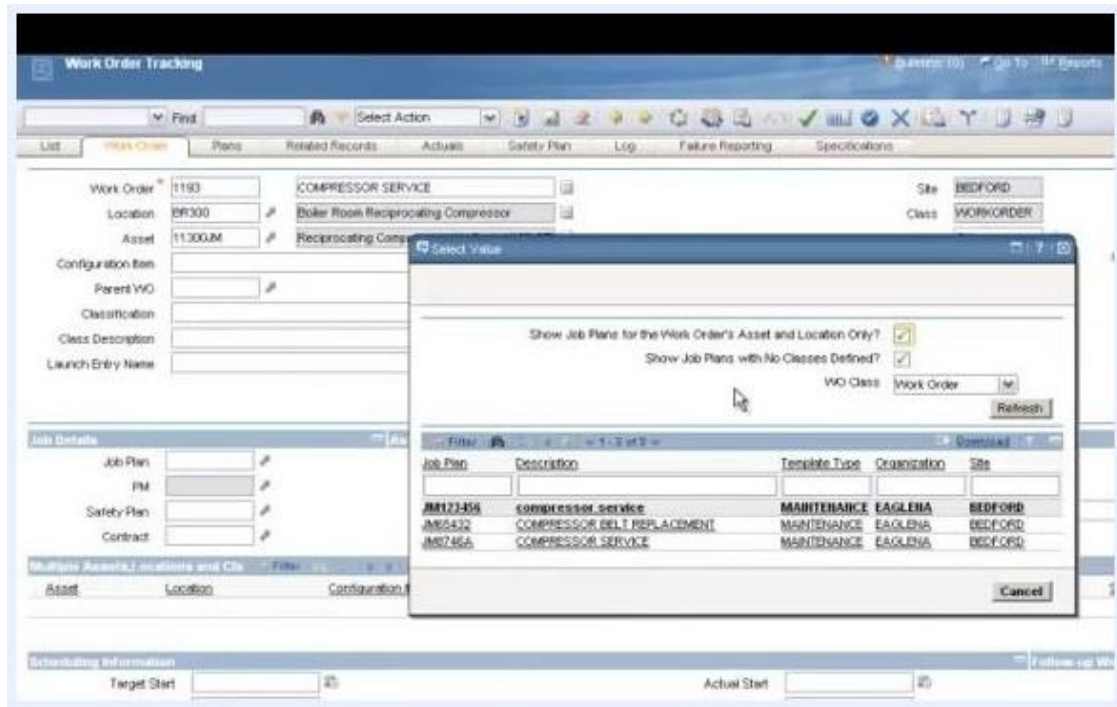
Select Value dialog open in the Work Order Tracking screen, listing work types such as CAL, CM, CT, CR, and EM, with CM being selected for Corrective Maintenance.

19. Assign a job plan to the work order

In the **Job Details** section, click the arrow next to the **Job Plan** field to open the **Select Value** dialog for job plans. The dialog offers filter checkboxes, including:

- Show Job Plans for the Work Order's Asset and Location Only?
- Show Job Plans with No Classes Defined?

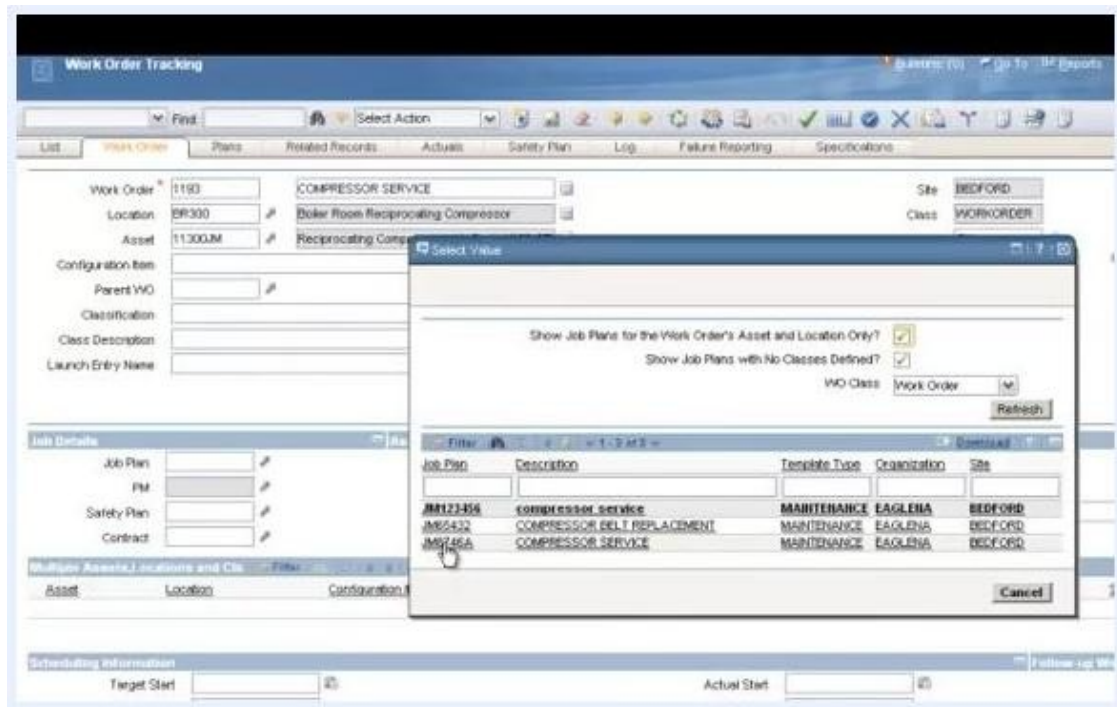
By default, these checkboxes may be selected to show only job plans relevant to the asset and location. The list may display options such as JM171546 (compressor service), JM245124 (COMPRESSOR BELT REPLACEMENT), and JM67546 (COMPRESSOR SERVICE). Uncheck the filter boxes if you want to view a broader list of job plans.



Select Value dialog for job plans, showing filter checkboxes and a list of job plans with descriptions, template types, organizations, and sites.

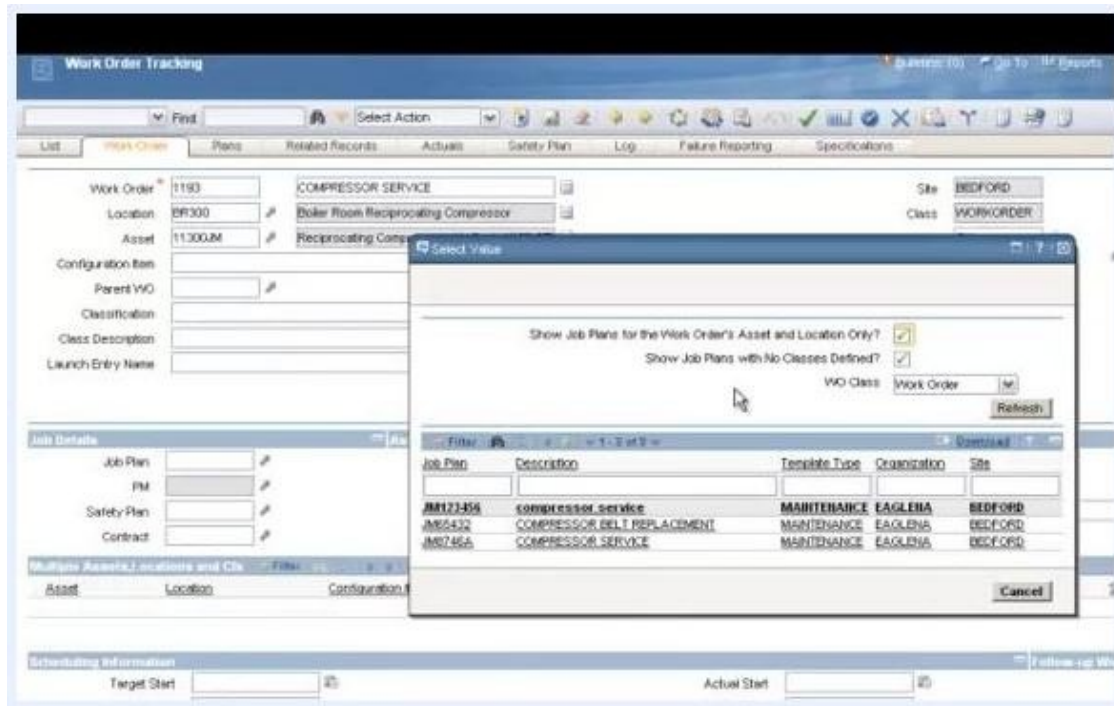
20. Select and apply the desired job plan

Click to select the job plan you want to assign (for example, [JM67546: COMPRESSOR SERVICE](#)), then click **OK** to apply it to the work order. The job plan is now linked to your work order.



User selecting the job plan JM67546 (COMPRESSOR SERVICE) from the list in the Select Value dialog.

Confirm that the selected job plan now appears in the **Job Plan** field of the work order, displaying the job plan code (for example, [JM67546](#)).



Work Order Tracking screen showing job plan JM67546 assigned in the Job Plan field, confirming successful assignment.

21. Review the work plan tasks pulled from the job plan

Navigate to the **Plans** tab of the work order to review the tasks automatically populated from the job plan. Example tasks include Isolate Compressor, Replace Belt, Replace Gasket, and Restart and Place Back in Service. Each task includes details such as sequence number, summary, estimated duration, and status.

Any changes made to these tasks within the work order affect only that specific work order—the original job plan remains unchanged.

Work Order Tracking

Find: [] Select Action: []

LIST WORK ORDER Plans Related Records Actuals Safety Plan Log Failure Reporting Specifications

Work Order: 0190 COMPRESSOR SERVICE Site: BEDFORD
 Location: ER300 Boler Room Reciprocating Compressor Class: WORKORDER
 Asset: 11300JM Reciprocating Compressor
 Configuration Item: []
 Parent W/O: []
 Classification: []
 Class Description: []
 Launch Entry Name: []

Job Details

Job Plan: []
 PM: []
 Safety Plan: []
 Contract: []

Multiple Assets/Locations and Cls

Asset: [] Location: [] Configuration: []

Scheduling Information

Target Start: [] Actual Start: [] Follow-up: []

Select Value

Show Job Plans for the Work Order's Asset and Location Only? ☒
 Show Job Plans with No Classes Defined? ☒
 WO Class: Work Order Refresh

Job Plan	Description	Template Type	Organization	Site
JMI23456	compressor service	MAINTENANCE	EAGLENA	BEDFORD
JMI2432	COMPRESSOR BELT REPLACEMENT	MAINTENANCE	EAGLENA	BEDFORD
JMI2456	COMPRESSOR SERVICE	MAINTENANCE	EAGLENA	BEDFORD

Cancel

Plans tab of the work order showing a list of tasks—Isolate Compressor, Replace Belt, Replace Gasket, and Restart and Place Back in Service—along with sequence, summary, estimated duration, and status details.

Using job plans pulls all relevant tasks and materials automatically into the work order, streamlining the planning process and ensuring consistency while saving time on repetitive data entry.



Work order Plans tab illustrating the efficiency gained through job plan inheritance.

What's next

Now that you know how to create a job plan in IBM Maximo and assign it to a work order, you can apply the same process to build job plans for other recurring maintenance tasks, link them to Preventive Maintenance records or routes, and continue refining labor, materials, and asset assignments to match your organization's workflows.